

Business Plan Worksheet

My Purpose: Why am I doing all of this?

5 Year Future Self

My vivid vision as I look forward.

1	
2	
3	
4	
5	

Top 5 Goals

My top goals for the year ahead

1	
2	
3	
4	
5	

My Force Multipliers

Sowing the seeds for an amazing future.

1	
2	
3	
4	
5	

My Community

Build the list. Serve the list.

1	
2	
3	
4	
5	

Monthly Focus Areas

Building on a monthly cadence for consistent growth.

Jan	
Feb	
Mar	
Apr	
May	
Jun	

Jul	
Aug	
Sep	
Oct	
Nov	
Dec	

Business Plan Worksheet

Estimate Your Daily Number

Transaction Goal Worksheet #1

#	Action	Number	Calculation
1	Transaction Goal		= Goal Volume / Average Sales Price
2	Total New Prospect Conversations Needed		= Line 1 X 59
3	Total New Prospect Conversations Needed		= Line 2 / 11 (months)
4	Daily New Prospect Conversations Needed		= Line 3 / 20 (work days per month)

Annual Dashboard

Transaction Goal Worksheet #2

#	Action	You (goal / actual)	Team (goal / actual)
1	Volume Goal for the Year		
2	Number of Transactions Needed		
3	Listing Consultations		
4	Listings Taken		
5	Listings Sold		
6	Buyer Consultations		
7	Buyers Represented		

Growth Strategy

Growing my legacy

1	
2	
3	
4	
5	
6	

My Commitments

Habits, rituals, and routines.

1	
2	
3	
4	
5	
6	

EXAMPLE

Business Plan Worksheet

My Purpose: Why am I doing all of this?

- 1 Me- to do good and help others
- 2 My Team- build a culture of gratitude and blessings
- 3 My Family- flexible work life to enjoy important moments
- 4 My Legacy- build wealth for my family's future

5 Year Future Self

My vivid vision as I look forward.

1	health - look & feel great!	-->
2	brand - be a recognized resource	-->
3	relationship - create family memories	-->
4	income - \$1mil net, 4 day work week	-->
5	wealth - \$1mil liquid, \$10k mo passive	-->

Top 5 Goals

My top goals for the year ahead

1	exercise & eat clean
2	daily IG/FB/YT reels
3	2 major trips per year
4	\$25mil + volume
5	will & trust planning

My Force Multipliers

Sowing the seeds for an amazing future.

1	health - write plan
2	brand - hire video editor
3	family - plan/schedule family time
4	income - hire virtual assistant, SEO, leads
5	wealth - build passive streams

My Community

Build the list. Serve the list.

1	500 leads per listing
2	focused time on leads
3	send 2 emails per week
4	geo farm, quarterly events
5	circle prospect, postcards for listings

Monthly Focus Areas

Building on a monthly cadense for consistant growth.

Jan	create health & family schedules/plan
Feb	hire VA, call 10hrs week, 1 email week
Mar	spring client event
Apr	create daily content plan & launch
May	launch farming campaign
Jun	summer client event

Jul	family vacation
Aug	back to school event
Sep	circle prospecting
Oct	fall farm harvest
Nov	farm holiday event
Dec	family vacation, plan for next year

Estimate Your Daily Number

Transaction Goal Worksheet #1

#	Action	Number	Calculation
1	Transaction Goal	50	= Goal Volume / Average Sales Price
2	Total New Prospect Conversations Needed	$50 \times 59 = 2950$	= Line 1 X 59
3	Total New Prospect Conversations Needed	$2950 / 11 = 268.18 (269)$	= Line 2 / 11 (months)
4	Daily New Prospect Conversations Needed	$269 / 20 = 14$ per day	= Line 3 / 20 (work days per month)

Annual Dashboard

Transaction Goal Worksheet #1

#	Action	You (goal / actual)	Team (goal / actual)
1	Volume Goal for the Year	\$10 million	\$25 million
2	Number of Transactions Needed	$20 \times \$500k$	$50 \times \$500k$
3	Listing Consultations	30	75
4	Listings Taken	20	50
5	Listings Sold	20	50
6	Buyer Consultations	30	50
7	Buyers Represented	20	50
Totals:		$(20 \times \$500k) \times 2.5\% = \mathbf{\$250k}$	$(50 \times \$500k) \times 2.5\% = \mathbf{\$625k}$

Growth Strategy

Growing my legacy

1	host 1 event per qtr
2	attend local events/mixers
3	attend trainings/clubs
4	talk to agents
5	invite agents to events
6	connect on social

My Commitments

Habits, rituals, and routines.

1	daily devotionals
2	add 100 contacts weekly
3	2hrs training per week
4	exercise 1hr per day
5	plan next week on Friday
6	1hr daily follow ip

Strengths (build, enhance)

Weaknesses (resolve, reduce)

Opportunities (exploit, expand)

Threats (avoid, thwart)

Your BEST Clients

List your 3 favorite clients:

Where they referrals or from your SOI?

What was their price range?

How long did you work with them?

Your DREAM Clients

Where do they live?

Where do they want to live?

Do they rent or own their current home?

What is their income?

What is their budget for a home?

What is their budget for your services?

Do they fit in a specific niche?

1st Time Buyer VA retired divorce downsizing upsizing

other:

Where do they work?

What are their hobbies?

Do they have pets?

Do they have children?

Target time frame contract to close?

Other notes:

Marketing Budget

Type

Monthly

Annually

Print Marketing:

listing flyers

signs

business cards

client packets

contracts

mailers

door hangers

Digital Marketing:

property photos/video

Facebook/Instagram ads

Google Ads

video editing

websites/domains

online management

billboards

Physical Marketing:

staging

client gifts

branded merchandise

pop-bys

open houses

food/catering

Business Budget

Type	Monthly	Annually
Print Marketing		
Digital Marketing		
Physical Marketing		
Total Marketing:		
Monthly Fee		
Desk Fee		
Transaction Fee		
Franchise Fee		
Total Office Fees:		
MLS		
Licensing		
CE Credits		
Taxes		
Total Licensing Fees:		
Total Expenses:		
Average Sale Price		
Average Commission Rate		
Average Commission Earned		
Homes Sold Goal:		
Total Income:		
Total Expenses:		
Total After Expenses:		

Crush Your Goals Worksheet

Goals	1 month	3 months	6 months	9 months	1 year	18 months	2 years	3 years
Health								
Family								
Home & Vehicles								
Finances								
Career & Education								

Real Estate Goals

Month	Appointments	Listings	Closings	Profits
	goal / actual	goal / actual	goal / actual	goal / actual
January				
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				
Totals				

Daily Activity Tracker

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Totals
New Connections							
New Adds to Database							
Sphere Contacted							
Follow Up Contacts							
Cards Written							
Social Media Posts							
Trainings Attended							
Listings Previewed							
Appointments Set							
Appointments Held							
Buyers Signed							
Listings Signed							
Homes Shown							
Offers Written							
Offers Accepted							
Contracts Managed							
Contracts Closed							

